

INSTITUTE FOR FEED EDUCATION & RESEARCH

2019-20 ANNUAL REPORT





MISSION

The Institute for Feed Education and Research (IFEEDER), a 501(c)(3) public charity was formed to ensure that consumers have access to a safe, healthy and sustainable food supply through:





Dear Friends of IFFFDFR:

As I write this letter, many of us are continuing to work in new ways and in new environments. It has been amazing to see how technology has kept us connected, safe and our businesses running. The animal food industry is an essential business and keeping our employees safe and animals fed are our top priorities. I applaud each of you for your efforts in making sure the country's food supply chain remains intact and providing nutritious and affordable meat, milk and egg products for Americans and food for their pets.

The Institute for Feed Education and Research had another successful year and I am thankful for the opportunity to have been a part of several great projects this past year. This annual report will provide you a snapshot of how we continue to build trust in the animal feed industry through research and education.

I am especially pleased to highlight first-of-its-kind research that proved the economic contribution pet food manufacturers make to the agriculture sector and studied the ingredients used in pet food. You will find more information about this and other recent projects as well as a look forward at what research projects are in the pipeline.

I am always especially grateful when I look at the donor honor roll and see the many friends and colleagues that have joined me in supporting IFEEDER. Thank you for your investment in IFEEDER.

The research and education work IFEEDER does to provide the facts in the face of all the misinformation and marketing hype being done today must continue. No matter what part of the animal food industry you are in, we all benefit from IFEEDER's work. The research and education that it provides allows each of us to learn and grow. It helps each of us to make our businesses a little bit better than they were the year before. And it helps build trust and understanding of the feed industry's role in producing safe, nutritious and affordable animal protein.

An investment in IFEEDER is an investment in the future success of our industry and we must continue sharing our industry sustainability efforts to produce even more efficiently.

Thank you again for your continued support.

- Bruce Crutcher IFEEDER Chair, 2019-20



IFEEDER BOARD OF TRUSTEES 2019-20

IFEEDER is led by a group of talented volunteers who set the agenda and assist in securing gifts from the donors mentioned throughout this report. We are very thankful for these highly engaged industry leaders.



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COMMITTEES 2019-20

EDUCATION AND MARKETING COMMITTEE

The IFEEDER Education and Marketing Committee provides the overall education and marketing direction for the charity. The committee develops strategic communications and marketing recommendations in conjunction with AFIA's Sustainability Oversight Committee and other allied organizations, coordinates the promotion and distribution of IFEEDER research projects and promotes food and agriculture career opportunities.



Cathy Bandyk, Ph.D.

AB Vista, Inc.

Marketing & Education

Committee Chair



Eric ArnoldBill Barr & Company, Inc.



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"IFEEDER plays a unique role in helping the industry and public better understand the issues and challenges of producing a safe, nutritious food supply for both animals and humans. The work of IFEEDER continues to be laser-focused on such issues as sustainability, animal health, the sector's role in the economy, the impact of innovation and better communicating the efforts and contributions of our industry."

Constance Cullman
 President & CEO, American Feed Industry Association



RESEARCH COMMITTEE

The IFEEDER Research Committee defines research priorities that are critical to the future of the animal food industry. Working with the broader membership and the academic and government research advisory board, the committee annually identifies and prioritizes new research needs, engages the appropriate entities to conduct this research and communicates the priorities and results to the industry.



Chad Risley, Ph.D.

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Research Committee Chair



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FINANCIAL HIGHLIGHTS FOR PERIOD ENDING APRIL 30, 2020

SUPPORT AND REVENUE





Throughout IFEEDER's history, one theme has been constant – advancing work that contributes to the sustainability of the animal feed industry. We started small and each year have built on our previous research projects. This year, IFEEDER highlights several projects that support the industry's sustainability story and we continue to help tell that story and build trust in the animal feed industry.



LAUNCHED THE GLOBAL FEED LCA INSTITUTE

In 2016, several international partners set out to establish a "global gold standard" for calculating the life cycle analysis (LCA) of feed ingredients. This effort gave birth to the Livestock Environmental Assessment and Performance Project, which established the methodology to accurately measure LCAs. In 2019, IFEEDER worked with the American Feed Industry Association (AFIA), European Feed Manufacturers Federation, Animal Nutrition Association of Canada (ANAC), International Feed Industry Federation and the Norwegian Seafood Federation to officially incorporate the Global Feed LCA Institute and kick-off the next phase in this project. The Global Feed LCA Institute recognizes that understanding animal feed's environmental footprint is critical to measuring the overall environmental footprint of animal nutrition and by creating the institute, the global partners can ensure that the data gathered is accurate, consistent and properly communicated to those throughout the animal food value chain.

The institute's mission will be to make publicly available an expanded regional and sectorial animal nutrition LCA database by developing and aggregating LCA datasets for the European Union, United States and Canada, South

America and other regions. The institute will also develop tools to assist stakeholders in assessing the environmental footprint of animal nutrition products and encourage continuous improvement throughout the global animal nutrition and food industry. To learn more about the Global Feed LCA Institute, visit globalfeedlca.org.

SUPPORTED RESPONSIBLE



IFEEDER continues to learn from the Center for Clarity and Leadership in Environmental Assessment and Research (CLEAR Center) how their research is continuing to bring clarity to the relationship of animal agriculture, the environment and our daily lives. The CLEAR Center is becoming a leader in science communication, thanks to the credibility of the center's director Frank Mitloehner, Ph.D., environmental and air quality specialist at the University of California at Davis. Communicating the science and outcomes of the center's research helps decisionmakers, thought leaders and consumer influencers better understand the everyday decisions farmers are making to promote the good health of animals, be good stewards of the planet's finite resources and respect individuals' dietary choices.

IFEEDER uses research and communications to amplify the solutions and innovations that are driving sustainable decision-making in the animal feed industry. This work goes to the heart of the IFEEDER mission of building trust and protecting choice. To learn more about the CLEAR Center, visit clear.ucdavis.edu.



Should the African swine fever (ASF) virus enter the United States, it could significantly impact the swine industry and broader agricultural economy. While feed is unlikely to be the way that ASF enters the country, feed may be how it is spread. That is why IFEEDER continues to invest in research to help fill in the knowledge gaps related to ASF. IFEEDER partnered with the Animal Nutrition Association of Canada and the Swine Health Information Center to examine not only the ways viruses could potentially enter and infect a feed mill, but also what mitigation steps could be implemented to contain them.

Looking at a multi-farm system experiencing a viral outbreak, Kansas State University, which conducted the study, evaluated the pathogen load in shared feed mills and its potential to spread and in doing so, identified biosecurity gaps.

Overall, the study found that where more biosecurity measures were in place at a feed facility, the lower the instances of pathogens on feed contact surfaces. As one might expect, when fewer biosecurity measures were in place, the likelihood that pathogen presence on feed contact surfaces increased. Given those results, the study showed that compliance with biosecurity protocols is critical in curtailing the prevalence and distribution of pathogenic viruses in a feed mill.





QUANTIFIED PET FOOD INDUSTRY'S CONTRIBUTION TO U.S. ECONOMY

With over two-thirds of U.S. households owning a pet and over \$30 billion in pet food sales, IFEEDER, in partnership with the North American Renderers Association and the Pet Food Institute, commissioned a study to better understand what goes into the production of pet food and its economic impact. This first-of-a-kind research found that the country's 500+ pet food manufacturers not only provided balanced, safe meals for America's dogs and cats, but also stimulate the overall agricultural

economy through the purchase of ingredients, labor and services from related industries.

ABOUT THE STUDY:

Decision Innovation Solutions, an economic research and analysis firm, examined the ingredients used in the production of pet food. Using a unique reverse engineering methodology, the firm determined the ingredients used and the value of those ingredients in pet food products. The model used data from a representative sample of pet food sales from June 2018 to June 2019. Utilizing expert analysis, they also estimated the economic impact the pet food industry has on the broader agricultural sector.



farm suppliers

The report found that U.S. pet food manufacturers purchase roughly 8.65 million tons of animal- and plant-based ingredients to provide the complete nutrition that dogs and cats need, at a value of \$6.9 billion. More than 500 safe and nutritious ingredients are used this ingredient variety allows for a diversity of options for shoppers at various price points to fit almost any budget. Often using leftover ingredients made from the production of human food, such as bakery or brewery items or parts of the animal that humans do not eat, the report also highlighted the pet food industry's commitment to minimizing food waste and reducing agriculture's environmental impact.

The partner organizations developed a robust communications strategy for sharing this information widely throughout 2020 with allied associations, state and federal lawmakers and in news media interviews.

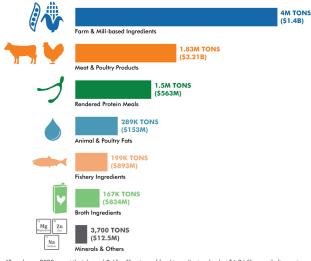
PET FOOD MANUFACTURERS GENERATE ECONOMIC VALUE THROUGHOUT THE SUPPLY CHAIN



manufacturers

manufacturers

DIVERSE INGREDIENTS ARE USED IN U.S. DOG AND CAT FOOD*



*Based on a 2020 report that showed 8.65 million tons of food ingredients valued at \$6.9 billion, excluding water.



Continuing to assess the needs of the animal feed industry and how the industry's public charity can leverage its resources to meet those needs, IFEEDER is investing in several multi-year efforts. Recent events have highlighted the need to be future-focused in key areas and to make sure that we can effectively communicate not only the work in which IFEEDER is investing, but the impact it has on the animal food industry. Two other high-priority projects underway will provide important insights for current and future challenges facing the industry.



Over the past year, IFEEDER's donors and member companies have spoken up about the need for the industry to intensify its focus on sustainability issues. While many companies have already put sustainability action plans into practice and are actively telling their sustainability stories, others want to do more, but are unsure of where to start.

Working with the IFEEDER Research Committee, the Board of Trustees and the AFIA Sustainability Oversight Committee, IFEEDER recognized that there was an opportunity to use the strengths of both organizations to

conduct sustainability research and provide insights and resources to member companies to help them on their sustainability and continuous improvement journey. We knew the first step had to be assessing where our industry is and developing a clear strategy to guide member companies in developing their sustainability programs and messages.

IFEEDER developed a request for proposal that aims to:

- identify the sustainability risks and needs of AFIA's members by segment (e.g., feed manufacturer vs. ingredient manufacturer, etc.);
- develop tools that AFIA's members can use to enhance or build their own sustainability programs;
- clearly communicate what sustainability means for the American animal feed sector:
- target specific sustainability research topics to close knowledge gaps; and
- develop a "sustainability roadmap" that helps AFIA members and IFEEDER connect the industry's overall sustainability story with the values of its stakeholders.

IFEEDER plans to evaluate proposals in the fall of 2020 with the goal to launch the two-phased research project, which also includes a communications strategy, in 2021.



CHARTING IFEEDER'S FUTURE PROJECTS

IFEEDER's Board of Trustees recently began a strategic planning initiative to inform the work of the institute over the next five years. Donors, members, affiliated organizations and others who have an interest in the public charity's work provided input. IFEEDER expects to complete its plan this fall and implement it immediately. If you have ideas, thoughts or suggestions, contact ifeeder@ifeeder.org to let us know what's on your mind.





ANALYZING SWINE DISEASE TRANSMISSION THROUGH DYNAMIC MODELING TOOL

Much like IFEEDER's previous work related to ASF, the industry recognizes that better understanding the role that feed could play in the spread of disease is the first step in providing the information that companies need to put science-based plans and protocols into practice to keep mills operating safely and protect the health of animals. In partnership with the North American Renderers Association and the North American Spray Dried Blood and Plasma Producers, IFEEDER is co-funding a study that will examine the movement of feed, feed ingredients and animals. It will utilize an epidemiological model to map the current and future transmission risk areas and quantify both the contribution of the main transmission routes and the impact of disease control interventions in the projected "next week" risk of spread. The goal is to better understand the role that feed products can play in the transmission of diseases such as porcine epidemic diarrhea virus and ASF. The study is being conducted by North Carolina State University and results are anticipated in late 2021.

EXAMINING IMPACTS OF NON-GM LIVESTOCK AND POULTRY FEED

The livestock, poultry and aquaculture industries have used genetically modified feed ingredients for more than 20 years. Research to date has not demonstrated any health risks to humans who have consumed food containing GM products or from animal food products from animals fed GM ingredients in feed. However, calls to remove GM ingredients from feed in the name of greater sustainability pose a threat to the feed and food industries' ability to continue providing choices in the marketplace. The results of this research project are likely to underscore the environmental and economic impacts of going GM-free in U.S. feed production. In addition, the analysis will better inform the feed industry on how to articulate the value of the use of GM feed ingredients as part of its discussions with policymakers and the public. Participating in this project are the National Corn Growers Association, United Soybean Board, U.S. Poultry and Egg Association and MFA Incorporated. The study results are expected by the end of 2020.



KENNY BERG RESEARCH AND EDUCATION FUND

Working alongside AFIA's Liquid Feed Committee, IFEEDER is pleased to continue strengthening the science for the use of the liquid feed sector's ability to deliver nutrient supplements in the beef and dairy industries through the administration of the Kenny Berg Research and Education Fund.

A subcommittee of the Liquid Feed Committee annually reviews and awards research projects important to the liquid feed industry. IFEEDER is proud to assist them in managing the details of the grant awards.

EMC SCHOLARSHIP FUND

Growing their commitment to helping young people see a future career in the animal food industry, the Equipment Manufacturers Committee (EMC) added two new scholarships this year. One of those scholarships will be funded by IFEEDER to show gratitude for their ongoing fundraising efforts and support of IFEEDER's mission. New scholarships have been established with Auburn University and Iowa State University. In addition, the committee continues to award four scholarships annually to deserving students from Kansas State University, North Carolina State University, North Dakota State University and California Polytechnic State University.

Also a first this year, IFEEDER and the EMC partnered with Feed & Grain Magazine during the International Production & Processing Expo to hold a fundraising event. We give our sincere thanks to them for their support of IFEEDER and the EMC.

The committee held the annual golf tournament during the 2019 Equipment Manufacturers Conference and raised funds to support the scholarship program. IFEEDER is proud to partner with AFIA's EMC in administering these funds.



THANK YOU.

Simply put, without our donors, IFEEDER would not be what it is today.

We are indebted to those who recognize the importance of ensuring safe and sustainable feed and food production. IFEEDER is grateful to be supported by you and so many other passionate, cause-driven people who commit each day to feeding the world.

IFEEDER thanks our donors who have made gifts between May 1, 2019 and April 30, 2020. Our honor roll shown here reflects our donors' cumulative giving to IFEEDER. We are pleased to recognize your generous and continuous support.

Contact us if we omitted your name in error or if you have questions or corrections at ifeeder@ifeeder.org or (703) 650-0141.

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As we review the opportunities available to our company to truly move the needle in the conversations that shape the future of agriculture, IFEEDER has the strongest return on our investment. Our support of IFEEDER has been impactful to the discussions on consumer concerns about animal agriculture, as well as providing funding to important research projects that provide answers to policymakers making important decisions about the regulations that will impact how we do business. IFEEDER should be first on the list when any business depending on animal agriculture looks to invest their charitable donation resources."

— Alan Gunderson
Vita Plus Corporation



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ILC Resources



We believe a strong education is key to a strong future. Zinpro is proud to be a supporter of IFEEDER as a source of research and education for the feed industry. The breadth and depth of IFEEDER and the leadership it provides helps address key issues and research-based solutions. Zinpro is an advocate for sound research and has supported IFEEDER with funding and being active in leadership. Collaborative research initiatives like the relationship with the CLEAR Center at UC-Davis address current issues in animal agriculture. Providing science-based answers to make animal agriculture more sustainable and address consumer-interest issues, such as environmental concerns, is imperative to the future of our industries. At Zinpro, we believe IFEEDER plays a critical role in this future."

— Terry Ward, Ph.D. Zinpro Corporation

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IFEEDER is a critical link in the ever-evolving food supply chain and your support is critical. Get involved or make advantion by visiting our website at ifeeder.org or by calling (703) 524-0810.

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- Make a one-time, monthly or annual donation
- Commit to a multi-year pledge
- Honor a loved one with a tribute gift
- Consider a planned gift

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- Serve on the IFEEDER Board of Trustees
- Serve on an IFEEDER committee
- Assist with introductions for fundraising
- Provide a testimonial



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EMPLOYEE GIVING

Each year, AFIA employees support IFEEDER through the employee giving program. Each person gives for a different reason, but 100% of AFIA employees support IFEEDER through employee giving. This message is well received by our members and funders alike and shows the staff's dedication to the mission of IFEEDER and members of AFIA.

Not growing up in agriculture, my time at the AFIA has been eye-opening to see what goes into producing our food supply. Supporting IFEEDER is one small way that I feel I am helping the industry grow through the research and education projects that they take on."

— Shakera Daley

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I was employed with the AFIA when the public charity was first launched and it has been great to see everyone in the industry come together through corporate or individual donations, the Purchasing and Ingredient Suppliers Conference silent auction, the Equipment Manufacturers Committee's scholarship fund, the Liquid Feed Symposium research and education fund and other fundraising projects. It was important for me to have the opportunity to give back as well."

— Veronica Rovelli

Rurik Halaby

William Braman



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"IFEEDER is supporting efforts to get the correct message out about agriculture's commitment to sustainability and addressing climate change. My company, and I, personally, have been financial supporters of IFEEDER since its inception. In addition, I have had the privilege of serving on the IFEEDER Board of Trustees and chairing its Research Committee, which has allowed me to give my time to a worthy cause and a fantastic industry.

There will be more challenges and opportunities ahead for the animal food industry. We can be more prepared for these upcoming challenges by taking an active role in the AFIA and financially supporting IFEEDER."

— -Chad Risley, Ph.D. General Manager & CEO, Berg+Schmidt America, LLC

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PLEASE LET US KNOW HOW YOU WOULD LIKE TO ENGAGE WITH IFEEDER.



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INSTITUTE FOR FEED EDUCATION & RESEARCH

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